

Welcome! This guide provides helpful information and examples to those new to Clerk Chat administration and management of basic settings for their Team or organization.

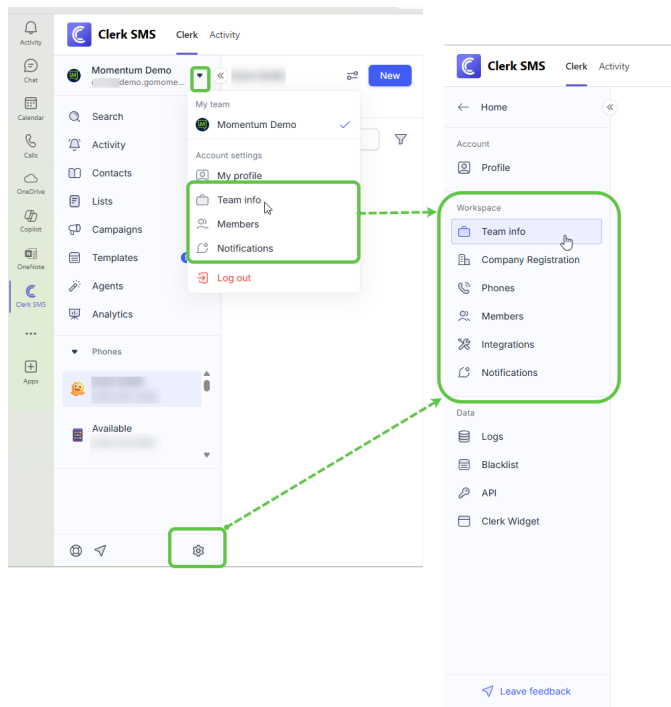
Workspace Settings

While logged into Clerk Chat as a Workspace Owner or Administrator access to workspace settings is available.

The Workspace administration settings menu offers access to the following:

- Team Info
- Company Registration (First Admin Task!)
- Phones
- Members
- Integrations: Ultimate Package
- Notifications

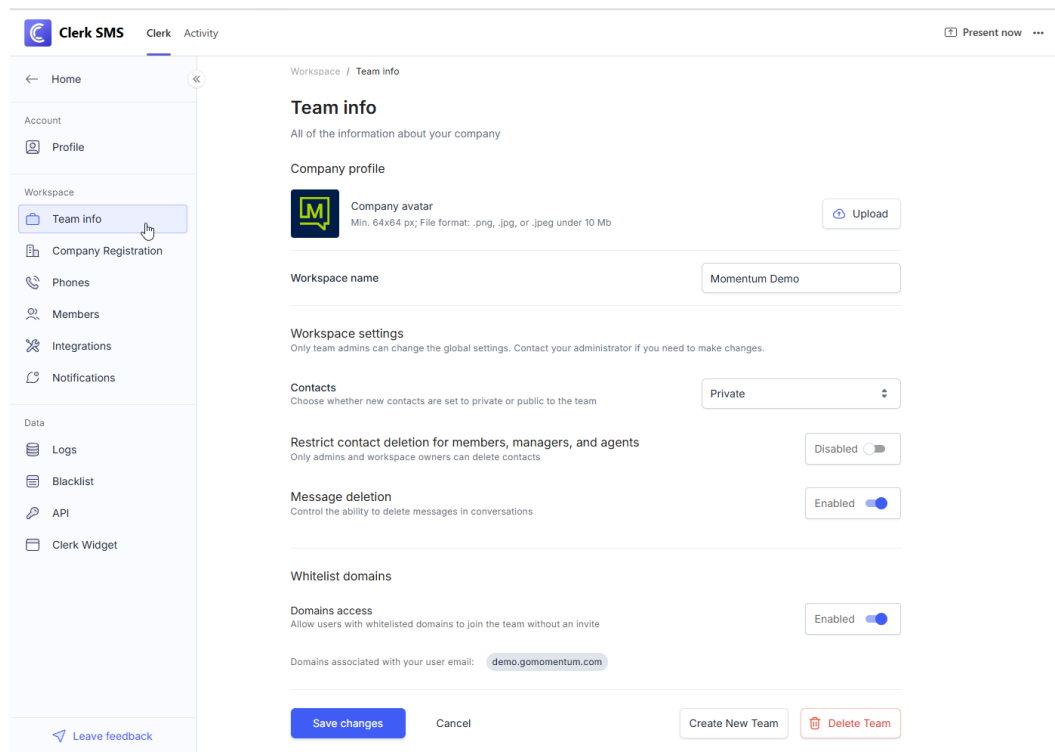
Open the Workspace settings section by clicking on Settings or the drop-down next to your Org name as shown here:



Team Info

Settings > Workspace > Team Info. This section offers access to the basic setup for the organization/account.

Settings related to Contacts, Messages, and the ability to Create or Delete teams can be found here.



Company Registration

Settings > Workspace > Company Registration
FIRST TASK!!

This area provides a wizard to walk you through the initial process of getting your brand/company registered for **NON**-Toll-free numbers with TCR. Complete the information requested and submit the information. If you have more than one Clerk Chat organization (you purchased two separate Clerk Chat packages) complete this process for one and then provide the full list of numbers for each Org to the service provider so they may facilitate brand compliance for both. You will receive progress notifications in this area for needed changes to get approved, or that the application has been verified as approved.

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Workspace / Company Registration

Register your brand

Company registration is required to comply with U.S carrier regulations. Register your company to continue using SMS.
[Learn more.](#)

Step 1 of 3. Your company information

Legal company name

Clerk Chat

Industry

Communication

Contact phone

+1 (864) 506-8019

Contact email

josh@clerk.chat

Address

16192 Coastal Highway

Country

United States

State / Province

DE

City

Lewes

ZIP / Postal Code

19958

Organization legal form

Private Profit

EIN

92-0632216

Proceed

Workspace / Company Registration for 10DLC

Company Registration for 10DLC

Company registration is required to comply with U.S carrier regulations. Register your company to continue using SMS.
[Learn more.](#)

Step 2 of 2: Opt-in consent

We've submitted your Brand on behalf of your company to comply with carrier requirements. The included privacy policy and language are crafted to align with carrier regulations. If your legal team has specific language requirements, you can request changes by reaching out to support@clerk.chat.

Widget URL

https://clerk.chat/misc/sms-opt-in/?customer=Clerk+Chat&widgetid=9e09da11-5ddf-41f1-b2c4-0a7ea3bbf68b

Back

Submit Verification

SMS Opt-in

Opt-in to receive messages

Your phone number

+1

Opt-in

SMS Privacy Policy

This Privacy Policy governs the manner in which we collect, use, maintain, and disclose information collected from users of our messaging services.

Consent

By opting in to our messaging services, you consent to the collection, use, and disclosure of your information as described in this Privacy Policy. We do not share end-user data with third parties for marketing or promotional purposes without the explicit consent of the consumer. Any data shared is limited to essential business operations and will not involve the sale or transfer of consumer information without direct consent.

Opt-out Instructions

We respect the right of our users to opt out of receiving future communications from us. If you wish to be removed from our messaging list and no longer receive communications from us, you can opt out by texting any of the following keywords: STOP, QUIT, END, REVOKE, OPT OUT, CANCEL, or UNSUBSCRIBE

Powered by Clerk Chat

https://clerk.chat

Workspace / Company Registration for 10DLC

Company Registration for 10DLC

Company registration is required to comply with U.S carrier regulations. Register your company to continue using messaging. [Learn more.](#)

Acme Example Company, LTD

United States • Technology

Verified

Due to the federal regulations, all companies are required to verify their business to be in compliance with 10DLC.

GoMomentum.com/support

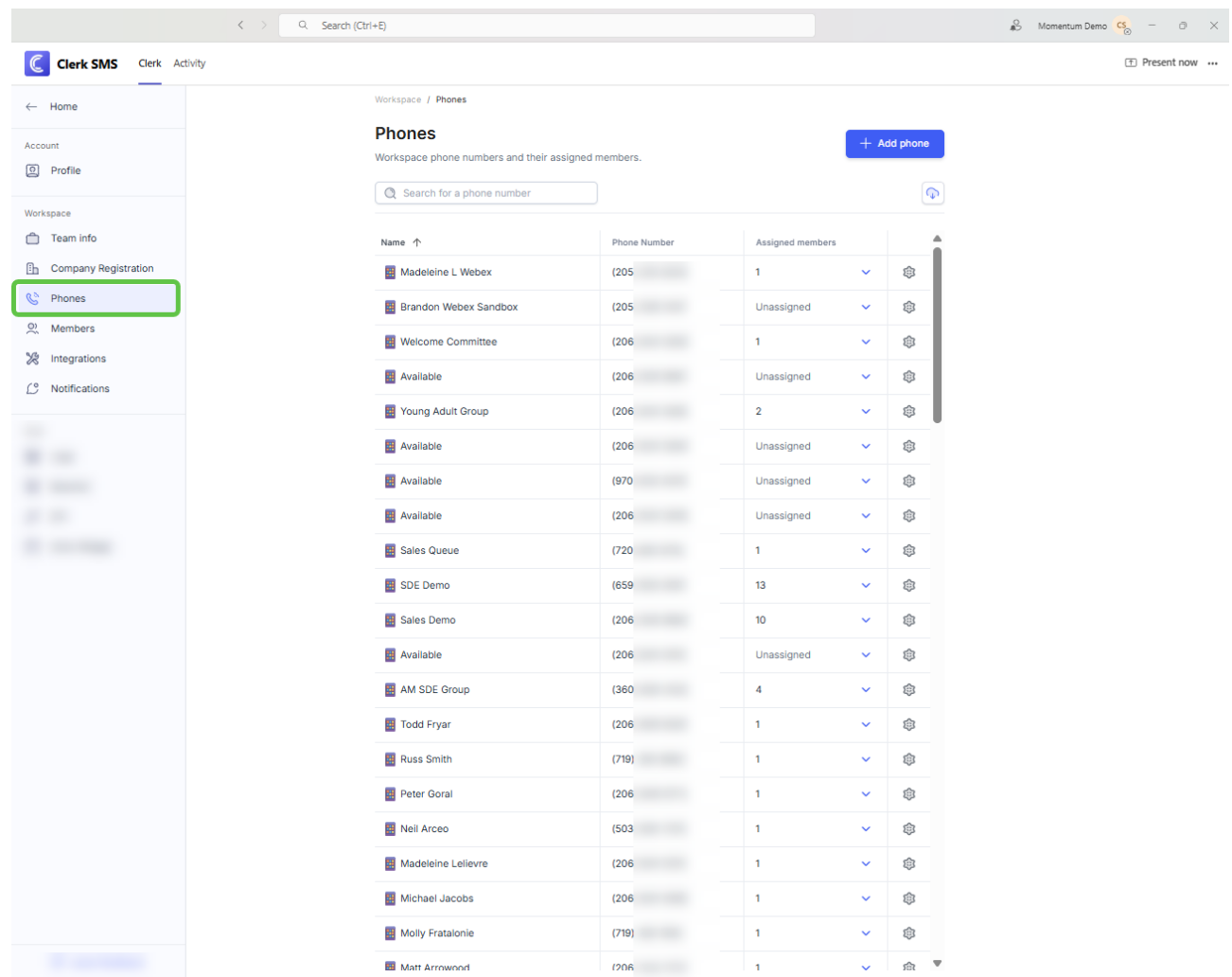
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888.538.3960

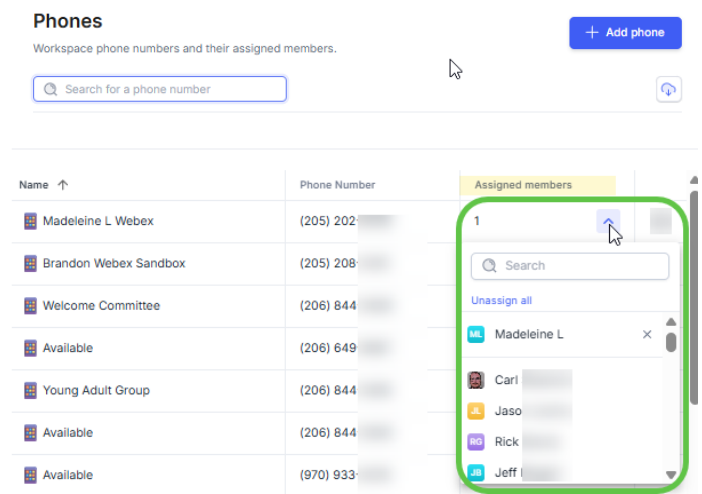
Phones

Settings > Workspace > Phones

This area provides admin access to the list of the phone numbers for SMS inboxes or members, along with the assignment information and the basic settings for each.

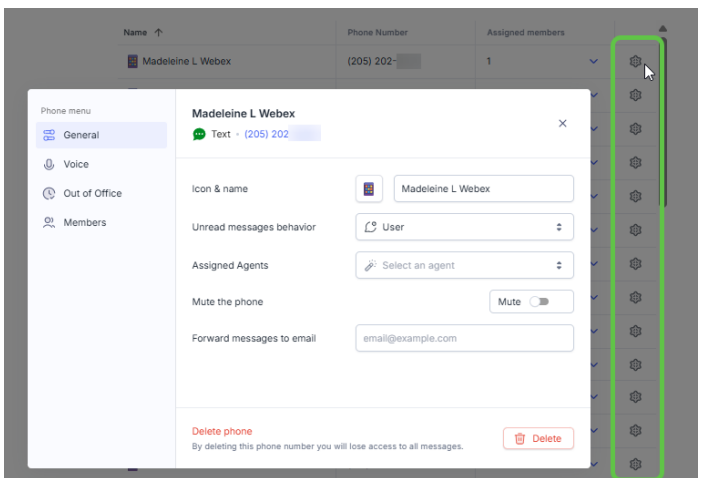


Administration tools to Search, manage assignments, download the list to a CSV or add a new phone number are provided here, as well.



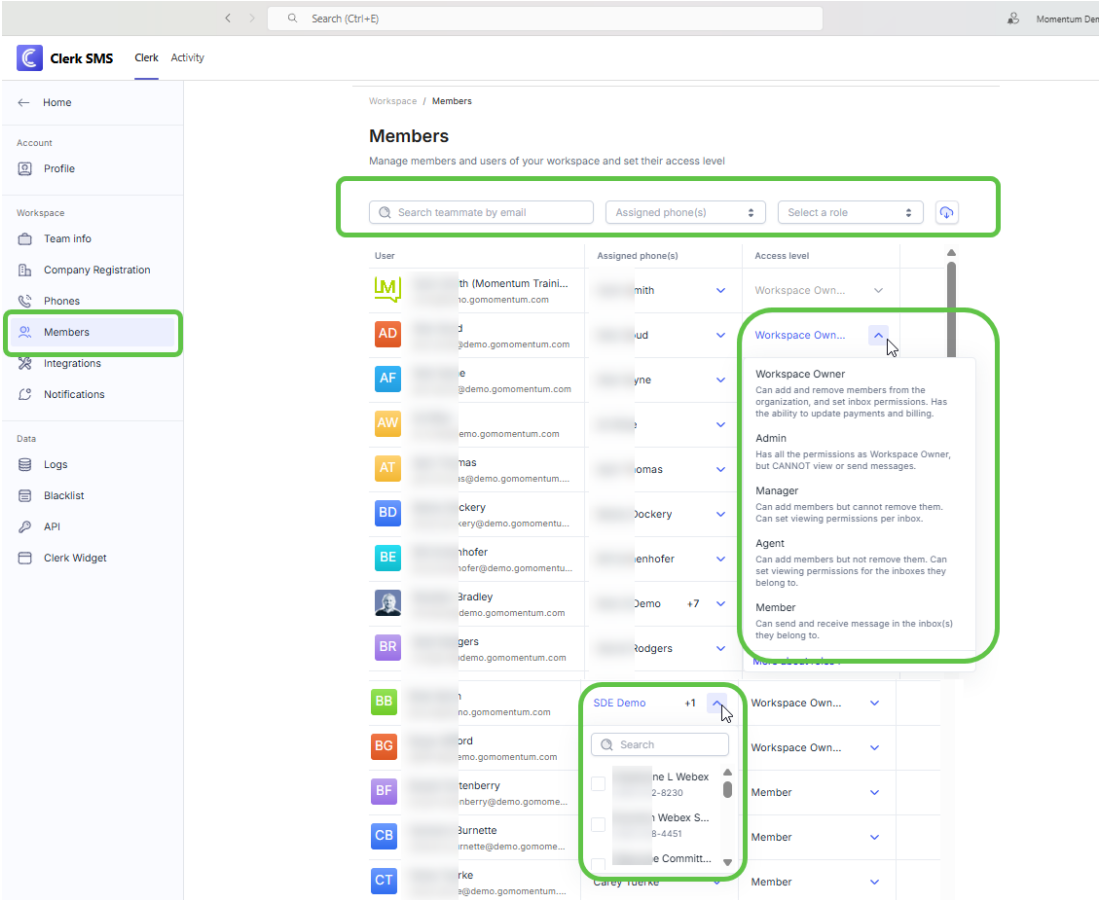
Member assignments per line can be managed from the drop-down in the table or in the Members section of the Settings for each line which is accessed via the gear icon in the far right column.

Settings also offers access to manage message notification settings, forwarding options, out of office behaviors, and (if authorized) the ability to delete the phone number/inbox (and all its messages in history)



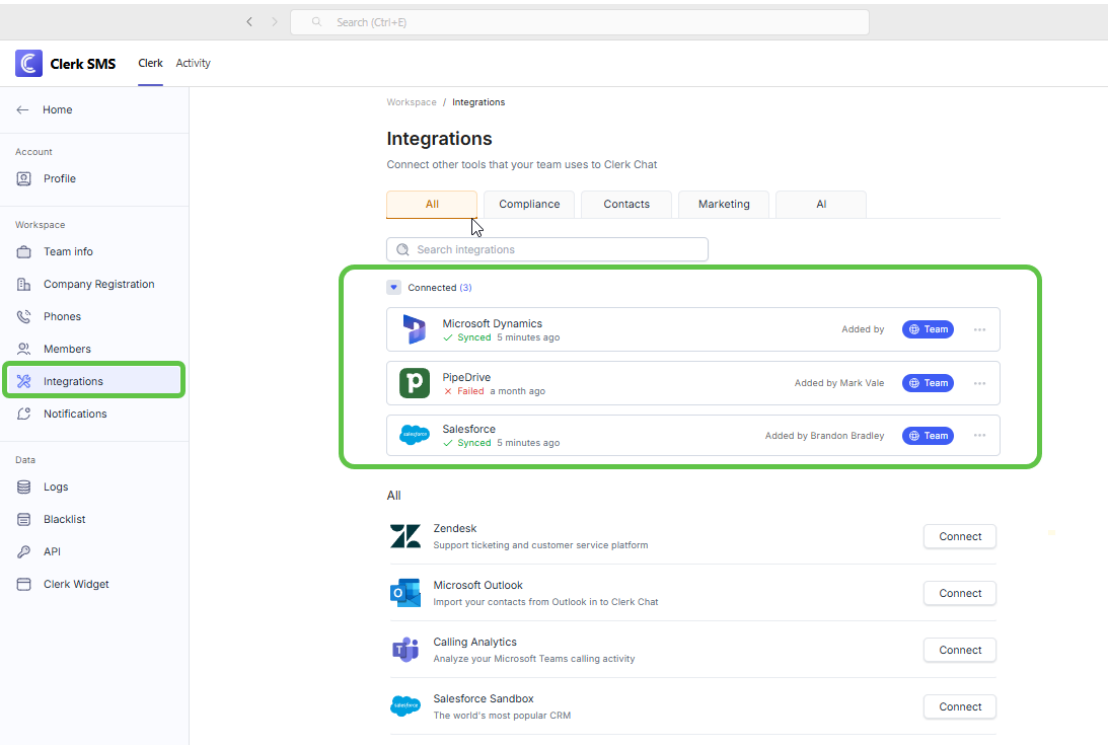
A Ya Vyf

Settings > Workspace > Members



hM fUjcbg

Settings > Workspace > Integrations



Notificationg

Settings > Workspace > Notifications
This area allows the admin to mute or unmute all inbox notifications

Workspace / Notifications

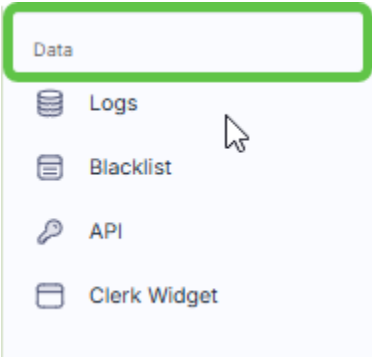
Notifications

Mute all Inboxes

Data Settings

While logged into Clerk Chat as a Workspace Owner or Administrator access to Data settings is available.

Go to Settings > Data. The Data administration settings menu offers access to the following:



Logs

Export any data / conversations from any phone number / inbox.

Select one or more phone numbers to export to csv.

Data / Logs

Logs

Export any data from any phone

Select one or several phone and download (export) all of the conversations. Clerk will generate a .csv file.

Select phones

Select All Phone Numbers

Download .csv

Blacklist

Ultimate Package Only - Add and manage a list of any words that your members (users) cannot include in texts (blacklisted words).

Data / Blacklist

Blacklist

Modify and add blacklisted words

Blacklisted words

Add words separated by comma

Add to the list

API

Ultimate Package Only - Use at own risk.

Generate the API key to access the Clerk Chat API programmatically.

Data / API

API

API Key

Generate an API key to access Clerk Chat programmatically. You will only see the secret immediately after generation, so store it securely.
[Read the API docs](#)

Generate New Key

Active keys: 2

Created at: 8/20/2025, 5:57:32 PM	Created by: [redacted]@demo.gomomentum.com	
Last used: 9/25/2025, 3:15:19 PM		
Created at: 9/11/2025, 10:06:07 PM	Created by: [redacted]@demo.gomomentum.com	
Last used: 9/12/2025, 3:59:56 PM		

Clerk Widget

Ultimate Package Only - Use at own risk. Collect website leads using a widget from Clerk Chat.

Data / Clerk Widget

Clerk Widget

Collect leads on your website by using the Clerk widget. [Learn more.](#)

Use this key in the form builder to capture contacts on your website

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